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Contract Grant Modification (46)

Introduction

This modification to NASA TechTracS was requested in a Work Request from Dianne Cheek of NASA Langley Research Center on 3/20/98 and is designated as Mod46.

It consists of changes and additions to existing data structures and revisions to displays, reports and processes. The user interface methodology currently in use in NASA TechTracS (TTS9803x) will be employed and extended as detailed herein. The user interface methodology for a given table in NASA TechTracS consists of:

- a *List* screen where fields from one or more records are displayed and may be operated on as a group

- a *Record* screen where all (appropriate) fields from a single record are displayed, possibly utilizing multiple pages via a pop-up menu

- various *Reports* available on the users workstation or via the batch workstation known as the *AutoAgent*.

- various *Dialogs* that permit the user to performs queries, sorts, etc.

This detailed design document contains sufficient information to complete the software development construction for Mod46 and includes a detailed user interface mock-up. It also specifies the changes required to the user documentation and

Design Overview

Reuse Strategy.
Since this development effort is primarily a series of modifications to an existing module in NASA TechTracS, extensive re-use of existing forms and reports will be made. The tools and objects currently in use in NASA TechTracS will be employed where appropriate. These include:

- Custom find methods

- Streamlined relate methods

- Page navigation methods (*More* pop-up)

- Record navigation methods (*Record* pop-up)

- List Manager pop-up menus

- Full screen text edit windows

- People and Company autolinking (*Business Card* buttons)

- Keyword management module

- Auto Agent/Personal Agent batch processing

- Record maintenance audit (*I* button)

- Standard List window methods

- Standard Record window methods

Quality Assurance
In order to maintain high quality design and construction the following QA elements will be incorporated:

- All program code must adhere to defined standards, especially in the area of method, form and object naming conventions. Appendix B contains details of these conventions.

- All errors discovered during any formal testing will be recorded in the online Knowledge Sharing Systems Bug Reporting System. This will ensure that errors are not identified more than once and that they are properly resolved.

- Unit testing of discrete components will be performed by the developer. These components will be identified in the Detailed Development Plan. As far as is practicable, the goal of this testing is to prove that a given software component performs as designed before it is exposed to the larger environment of integration or system testing. For example, each method should be unit tested to verify proper use of passed parameters and, if appropriate, returned results.

- Developers will perform source code tracing where appropriate to prove that the code executes as expected. Research has shown that regular use of source code tracing and unit testing will identify many errors early in the development cycle. Errors identified early are more easily and more cost-effectively resolved.

- Component reviews will be conducted by the developer and an appointed reviewer, probably a fellow developer or technical supervisor depending on the complexity of the component and the skill level of the developer. A Component Review Checklist (see Appendix A) will be used to ensure consistent review quality. Once a component has passed its review, it may participate in integration testing. Part of the review will include an analysis of the component by scanning TechTracS source with SanityCheck from Foresight Solutions. SanityCheck is an application that will perform a read-only scan of the 4th Dimension™ structure file. SanityCheck sifts through the structure file looking for common programming problems as well as checking the integrity of all objects (Forms, Methods, etc) within the structure file.

- Integration Testing will be conducted to ensure that all new or modified components perform as expected when combined with other elements of NASA TechTracS. Due to the integrated nature of the TechTracS development process, extensive, detailed integration testing is inappropriate. However, sufficient testing should be performed to ensure compatibility with other components of the system.

- System testing of this modification will be combined with testing of other modifications that are scheduled for the same release. A system test sequence will be developed to fully validate that the modifications have been properly implemented. After release, the system test sequence should be incorporated into regression test plans for future modifications.

User manual
Description of changes to user manual (and DBA manual if affected).

Design Methodology
Discussion and high level diagrams of the selected system design showing external data interfaces, interconnections among subsystems and data flow.

Design Status

∅ Initial Letter – Before the procurement data was imported into NASA TechTracS, field centers would enter the Contract/Grants which would automatically print an initial letter after selecting a Company. Since the procurement data is being entered monthly, the initial letter must be manually printed unless the center enters the Contract/Grant data ahead of the procurement data. To aid in knowing what new contracts are being loaded each month, an [Action Item] record is created after each import indicating new [Contract_Grant] and new [Inventory] records. Is this process OK or should be print the Initial Letter out during the procurement load? [Leave as is.]

∅ Contract Letter **series 130** (Request at end of Contract to Company)/**series 140**(Request at end of Contract to NASA Tech Rep) and corresponding data fields are being removed. If centers are currently using these letters and corresponding data fields, should the removed data field values be moved to the Request for Final NT Report section date fields? (See Contract Grant Data Screen (4) – Letters on page 19) [Remove]

∅ Contract Clauses – From the procurement data load there is a field indicating that the Contract/Grant has the New Technology clause. For large businesses this is OK. However, for small businesses this is a problem because we do not know that the company is a small business unless it is an SBIR contract. Therefore, the PR Contractor (clause) is not set correctly for small business. Instead, the NT Clause is set for small business.[This will be a new mod to correct this problem.]

∅ SBIR/STTR Remaining Amount – This is currently not a dataase field but is calculated when the user navigates to the SBIR/STTR Information (Data Screen 6). Should a new field be added to calculate this value? [Leave as is]

∅ Should the Contract Reports table be changed to Interim Reports? [Keep name Contract Reports.]

∅ The mod has Request for Specific Items on 2 screens—Lettters and Interim/New Technology Information? Is this a mistake? [Remove]

∅ 150 Series Letter Processing – used the Potential Reportable Items table to generate letters. Since the table is no longer used, it is assumed that there will no longer be a letter trigger for [Contract_Grant]Date Received Specific Item.[True there will no longer be a trigger, user can still manaully print. No need for the Specific Items check box since there is no Automatic printing.]

∅ 165 Series Letter Processing – Certification of Compliance Letter to Company (Please provide more detail-assumption is that new Certification Letter on data screen is for Certification of Compliance Letter to NASA). [No Longer needed]

∅ 175 Series Letter Processing - Certification of Compliance Letter to NASA (Please provide more detail-do not think this is currently needed since the fields that support it are going away.) [Still needed - Leave as is.]

∅ Current method used for series 165/175 is the following:

   ∅ AT KSC ONLY: when [Contract_Grant]Date Final NTR Received and [Contract_Grant] Grant]Date Rec Final Signoff From COTR dates are both not equal to !00/00/00! And [Contract_Grant]NASA Certify Letter is true, then series 175 is queued for printing.[True for all Centers]

   ∅ Other CENTERS: when [Contract_Grant]Acceptable NTR (being removed) is not equal to !00/00/00!, then 1) if [Contract_Grant]Co Certify Ltr (Not found in Mod. Remove?) is true, then series 165 is queued for printing, 2)) if [Contract_Grant]Issue Cert Compliance Letter is true, then series 175 is queued for printing. [Rule no longer is true]

∅ Co Contract Rep is changing to [Contract_Grant]C/G Contract Rep ID. Should we change [People Code]People Code to [People]ID? The people reference is referred as People Code elsewhere in NASA TechTracS) Note: This same question applies to all the referenced People fields.
Use code or people codeinstead of ID. [We will use code and initiate a mod to change to ID consistently

throughout NTTS]

∅ [Contract_Grant]Company Code is changing to [Contract_Grant]Organization ID (∅ Do we change Company table to Organiztion? The company is referred as Company Code elsewhere in NASA TechTracS) [Keep name as Company Code]

∅ [Contract_Grant]Date Entered (Not displayed on any screen.) - means date the record was created. Should we keep it like it is for historical purposes? [Remove field but migrate to Audit table during date conversion]

∅ [Contract_Grant]Field Center is changing to [Contract_Grant]Center. Should we use this same name in other tables? [Use Center consistently throughout NTTS]

∅   [Contract_Grant]Init Ltr to Co is changing to [Contract_Grant]Initial Letter to Company (Should it be changed to [Contract_Grant]Init Ltr to Organization?). [Leave as is]

∅   Contract_Grant]Last Update is changing to Contract_Grant]Date Record Last Modified. This is inconsistent with other similar date for other tables. [DO NOT CHANGE]

∅   Contract_Grant]PR Ret Contract is being removed. If currently True, should it set Contract_Grant]PR Contractor (which used to be PRSB Clause) to True [Rename PR Ret Contract instead of PRSB and remove PRSB].

∅   Reports have not been identified by the NASA TechTracS CMT as to whether they need updating or not.

∅   Should the Request for Final NT Report, Specific Items, COTR Signoff, Final Technical Report be moved to Contract Reports table? [No]

list of constraints, concerns amd problem areas; list of assumptions possible effects on design; list of TBD requirements and their effects.

Development   Environment.
Describe computers and operating systems that are involved in this modification.

Operations   Overview

Operations scenarios/scripts

System performance considerations

Detailed Development   Plan

Introduction
Overall subsystem capability

Requirements   Definition
Refer to original work request and any subsequent documentation.

Detailed   Design
Implementation of this modification is broken down into several components, each of which is described in detail on the following pages. Each component, upon completion by the developer must pass a component review as described in Quality Assurance on page 5.

The components are:

- **Data Structure Revisions**

- **Data Conversion**

- **List Screen Modifications**

- **Data Screen Modifications**

- **Reports and Letters**

Data Structure Revisions

In order to support the changed requirements of this modification, changes and additions to the existing database structure must be performed. The Current (FY98.03.xx) Tables/Fields table on page 32 show the current database structure of the affected tables. The Revised Tables/Fields table on page 35 show those tables and fields that are impacted by this modification and describes the changes to be made to the database in order to satisfy this modification.

This component consists of implementing those changes.

Data Conversion

Make Chronology Records for the following fields:

    [Contract_Grant]Acceptable NTR
    [Contract_Grant]Closeout Recvd
    [Contract_Grant]Co Certify Dt
    [Contract_Grant]Co Certify Ltr
    [Contract_Grant]Fixed Price
    [Contract_Grant]FM NASA Office
    [Contract_Grant]FM NASA Org
    [Contract_Grant]FM NASA Phonev
    [Contract_Grant]FM NASA POC
    [Contract_Grant]FM Pro Ref
    [Contract_Grant]Inactive Date
    NT Clause Dt

NT Co Flwup Dt
~~NT Flwup Co 1~~
~~NT Flwup Co 2~~
~~NT Flwup NASA 1~~
~~NT Flwup NASA 2~~
NT from Co Dt
NT from NASA Dt
NT NASA Flw Dt
NT Req Co
NT Req Co Dt
NT Req NASA
NT Req NASA Dt
Partial Closeou
PR Ret Contr Dt
PR Ret Contract
PR Ret Grant Dt
PRI Clause
PRI Clause Dt
PRSB Clause
PRSB Clause Dt
SBIR Clause
SBIR Clause Dt

~~PRSB Clause is set to True if PR Ret Contract is currently true (Note: PR Ret Contract is being removed).~~

[Contract_Grant]Active becomes equal to opposite of [Contract_Grant]Active (or not[Contract_Grant]Active) – field used to be named [Contract_Grant]Inactive

Transfer [Contract_Grant]Date Entered to the [xAudit] table

[Potential Reportable Items] related records.

Calculate [Contract_Grant]Remaining Amount

Major Methods Impacted

FinalLetters - Series 130/140 Final letters are no longer needed (remove supporting code).

Followup – Series 130/140/150 Followup letters are no longer needed (remove supporting code). Potential Reportable Items table no longer available (remove supporting code)

Assumptions about and restrictions to processing.

Discussion and high-level diagrams of subsystems including interfaces, data flow and communications.

High-level description of input and output.

Detailed description of processing keyed to user-specified input and actions in terms of points of control, functions performed and results obtained (both normal and abnormal).

Data Screens

All screens will have the following characteristics:

Stardard screen buttons (*Accept, Cancel, Record, More, Print, Help*)

[Contarct_Grant]Contract/Grant No.

[Contarct_Grant]Center

Standard Information Icon

More choices will include: General Info, General Info (Cont'd), Contacts, Letters, Interim/New Tech Info, SBIR/STTR Information, Chronology/Action Items, Inv/Partnerships/SStories.

Note: Where appropriate, the full text edit button will be used for text fields.

General Info (Data Screen 1)
Refer to the sample image on page 26 for the objects and their placement on this screen.

Data Screen Method Method Requirement (DoView):

Use Standard List Management for the following fields:

- [Contract_Grant]Closeout Problem

- [Company]Business Type

- [Company]Ownership

Query [Subcontracts] table to identify the number of [Subcontractor] records

If [Contract_Grant]Company Code is not equal to 0, Query [Company] table to idendify [Company]Name and make assignment.

Buttons:

Status (Standard Status Dialog will be displayed)

Add… (Subcontractor) – Use standard Add Included method.

New Window… (Subcontractor) – Use standard NewWindow method.

Pop-ups:

[Contract_Grant]Closeout Problem – values include:
    (blank)
    1-Result of Search
    2-By Proc.w/out Auth.
    3-New Tech Not Expected
    4-W/out Final Doc.
    5-Transfer to Another Ctr

    Note 1: Needs to be moved to xList so that values can be added (Currently a 4D List).
    Note 2: Only the first character of the value is stored in the database.

[Company]Organization Type – values include:
    (blank)
    LE:Large Entity
    SB:Small Business
    CU:College/University
    NP/Non-Profit
    GE:Gov't Entity

Note 1: List is not editable.
Note 2: Only the first 2 characters of the value are stored in the database.

[Company]Organization Ownership
    (blank)
    Disadvantaged/Minority
    Generic Private
    Generic Public
    Handicapped
    Multinational
    Veteran
    Women
    8(a) Certified

Note 1: List is not editable.

Special Field Processing

[Contract_Grant]Contract Grant Title – Make keywords out of the title.

[Contract_Grant]Public Data Release to NTAS – Use standard UploadCheck to make sure user has permission to make field change.

Automatic Letter Objects

Company Business Card – after selecting a company using the standard Company selector dialog, 100 series letter (Initial Letter) is queud for printing.

[Contract_Grant]Date CTO Closed – Series 160/170

Series 160 – if [Contract_Grant]Date CTO Closed is not equal to !00/00/00! And [Contract_Grant]Requested Final NTR is true, series 160 letter is queud for printing.

Series 170 – if [Contract_Grant]Date CTO Closed is not equal to !00/00/00! And [Contract_Grant]Req Signoff from NASA COTR is true, series 160 letter is queud for printing.

Chronology Generating Objects/Fields:

[Contract_Grant]Date Ending
[Contract_Grant]Date Awarded
[Contract_Grant]Contract Amount
[Contract_Grant]Date CTO Closed

Other: (none)

(DoView Notes: 1) Put DoView method in the ViewProc 4D List. 2) Unload tables where necessary. 3) Declare local variables. 4) Pass local variables as parameters in method calls. 5) Identify method in header.)

General Info Cont'd (Input Screen 2)
Refer to the sample image on page 26 for the objects and their placement on this screen.

Data Screen Method Method Requirement (DoView):

KW Before method call to load KeyContract records in standard Keyword manager interface

Load Service/Product Code Title from [Products_Services]

Load SIC Title from xSIC Lookup tables.

LM Before Pop method call for [[Contract_Grant]Type]

Pop-ups:

[Contract_Grant]Type – values include:
        (blank)
        Acquisitions (subitems include: Contract Order, Cooperative Agreement, Intragovt. Fund Transfer, Research Grant, SBIR Phase 1, SBIR Phase 2, SBIR Phase 3, STTR, Other Procurement)
        Space Acts (Reimbursable Space Act, MOA, Non-Reimbursable Space Act, MOU, Intetagency Agreement, TTCP Agreement (Int.), Letter Agreement (Int), AGARD Agreement (Int.), Training Grant of Fellowship, Facility Grant, Space Act-Tech Affiliate, Space Act-Tech Assistance, Generic Space Act, NDA/Beta-Testing)
        Other (IHPTET, Community Service, Disaster/Rescue Svs., Loan Agreement, Teching Program, TRP Agreement, Other Non-Space Act Agrmt.)

Note 1: List is not editable.

Special Field Processing: (none)

Automatic Letter Objects: (none)

Chronology Generating Objects/Fields: (none)

Other: (none)

Contacts (Data Screen 3)
Refer to the sample image on page 27 for the objects and their placement on this screen.

Data Screen Method Method Requirement (DoView):

    Standard PersonData method for loading [Contract_Grant] people data.

Buttons:

    The standard business card is used to select the following People from the Contract_Grant table: Contract Representative ([Contract]), Principal Investigator ([Contract]), New Technology Representative ([Contract]), Contracting Specialist ([Contract]), Contracting Ofcr. Tech. Rep. (COTR) ([Contract]), Commercial Technology Ofc. Rep. ([Contract], Other Contract ([Contract]).

Pop-ups: (none)

Special Field Processing: (none)

Automatic Letter Objects: (none)

Chronology Generating Objects/Fields: (none)

Other:

    The following information is displayed for each Person:

        [People]First Name+[People]MI+[People]Last Name+
        [People]Mail Code
        [People]Area Code+[People]Phone+[People]Ext
        [People]Org Code

Letters (Data Screen 4)
Refer to the sample image on page 27 for the objects and their placement on this screen.

Data Screen Method Method Requirement (DoView): (none)

Button: (none)

Pop-ups: (none)

Special Field Processing: (none)

Automatic Letter Objects: (none)

    [Contract_Grant]Date Final NTR Received – 175 Series Letter Processing (Current Method)
    [Contract_Grant]Date Received Specific Item – (no longer needed) 150 Series Letter Processing
    [Contract_Grant]Date Rec Final Signoff From COTR – 175 Series Letter Processing (Current Method)

Chronology Generating Objects/Fields: (none)

    [Contract_Grant]Final Co Recv Dt (old field name)
    [Contract_Grant]Sp Item Recvd Dt (old field name)
    [Contract_Grant]Fnl NTR Report Date (old field name)

Other:

150 Series Letter Processing – ∅ used the Potential Reportable Items table to generate letters. Since the table is no longer used, it is assumed that there will no longer be a letter trigger for [Contract_Grant]Date Received Specific Item.

165 Series Letter Processing – Certification of Compliance Letter to NASA (∅ Please provide more detail).

175 Series Letter Processing - Certification of Compliance Letter to Company (∅ Please provide more detail)

 Current method used for series 165/175 is the following:

∅AT KSC ONLY: when [Contract_Grant]Date Final NTR Received and [Contract_Grant] Grant]Date Rec Final Signoff From COTR dates are both not equal to !00/00/00! And [Contract_Grant]NASA Certify Letter is true, then series 175 is queued for printing.

∅ Other CENTERS: when [Contract_Grant]Acceptable NTR (being removed) is not equal to !00/00/00!, then 1) if [Contract_Grant]Co Certify Ltr (Not found in Mod. Remove?) is true, then series 165 is queued for printing, 2)) if [Contract_Grant]Issue Cert Compliance Letter is true, then series 175 is queued for printing

Interim/New Tech Info (Data Screen 5)
Refer to the sample image on page 28 for the objects and their placement on this screen.

Data Screen Method Method Requirement (DoView):

    Query [Contract Reports] where [Contract Reports]Contract Number equals [Contract_Grant]Contract Number

    Query [Technology] where [Technology]Contract Number equals [Contract_Grant]Contract Number

Buttons:

    Interim NT Reports – standard Add…, Edit…, Delete…, New Window… buttons.

    Related New Technologies - standard Add…, Edit…, Delete…, New Window… buttons.

Pop-ups: (none)

Special Field Processing: (none)

Automatic Letter Objects: (none)

Chronology Generating Objects/Fields: (none)

Other: (none)

SBIR/STTR Information (Data Screen 6)
Refer to the sample image on page 28 for the objects and their placement on this screen.

Data Screen Method Method Requirement (DoView):

    Query [SBIR/STTR Purchase Request] where [SBIR/STTR Purchase Request]Contract Number equals [Contract_Grant]Contract Number

    Query [SBIR/STTR Technical Report] where [SBIR/STTR Technical Report]Contract Number equals [Contract_Grant]Contract Number

Buttons:

- Purchase Request - standard Add…, Delete… buttons. (Note: Information is edited on Input screen)

- Technical Report Received - standard Add…, Delete… buttons. (Note: Information is edited on Input screen)

Pop-ups: (none)

Special Field Processing: (none)

Automatic Letter Objects: (none)

Fields that Trigger Creation of a Chronology Record

- [Contract_Grant]Contract Amount

Other:

Chronology/Action Items (Data Screen 7)
Refer to the sample image on page 29 for the objects and their placement on this screen.

Data Screen Method Method Requirement (DoView):

    Query [CG Chronology] where [CG Chronology]Contract Number equals [Contract_Grant]Contract Number

    Query [Action Items] where [Action Items]Foreign Table Number equals 9 and [Action Items]Foreign ID = [Contract_Grant]ID

Buttons:

- Chronology - standard Add…, Edit…, Delete… buttons.

- Action Items - standard Add…, Edit…, Delete… buttons.

Pop-ups: (none)

Special Field Processing: (none)

Automatic Letter Objects: (none)

Fields that Trigger Creation of a Chronology Record (none)

Other: (none)

Inv/Partnerships/SStories (Data Screen 8)
Refer to the sample image on page 29 for the objects and their placement on this screen.

Data Screen Method Method Requirement (DoView):

> Query [Inventory] where [Inventory]Contract Number equals [Contract_Grant]Contract Number

> Query [Partnerships] where [Partnerships]Contract Number equals [Contract_Grant]Contract Number

> Query [Success Stories] where [Success Stories]Contract Number equals [Contract_Grant]Contract Number

Buttons:

- Inventory - standard Add…, Edit…, Delete…, New Window… buttons.

- Partnerships - standard Add…, Edit…, Delete…, New Window… buttons.

- Success Stories - standard Add…, Edit…, Delete…, New Window… buttons.

Pop-ups: (none)

Special Field Processing: (none)

Automatic Letter Objects: (none)

Fields that Trigger Creation of a Chronology Record: (none)

Other: (none)

New Record Requirements include:

Must have a contract number.

[Contract_Grant]Center is set to ◊NASAName

[Contract_Grant]Date Entered is set to the current date.

Method Init CG Ltrs is executed to establish default settings for automatic letter generation.

[Contract_Grant]ID is generated using NextNo method.

[CG Chronology] record is created. Detail equals "Contract/Grant Record Created/Executed." Method SetCGStatus is used to create record.

Structure charts showing interfaces, data flow, interactive control, interactive input and output, and hardcopy output.

Internal storage requirements.

List of possible error messages or events.

Description of global data structures (objects, lists etc.)

User Interface Mock-up

Current User interface screens

Contract Grant List Screen

Contract Grant Data Screen (1) – General Information

Contract   Grant   Data   Screen   (2)   –   Abstract/Keywords

Contract   Granat   Data   Screen   (3)   –   Contacts

Contract   Grant   Data   Screen   (4)   –   Letters

```
═══════════════ Contract_Grant: Adding New Record ═══════════════ 

Activity No. │NAS10-Sample│                                    ( i )
 ┌─────────────────────────────────────────────────────────────┐
 │                            Letters                            │
 ├─Initial Letter────────────────────────────────────────────── ┤
 │ │00/00/0000│ ⊠ To Company                                     │
 │ │00/00/00  │ ☐ To NASA Tech Representative                    │
 ├─Request at End of Contract────────────────────────────────── ┤
 │ │00/00/00│ ☐ To NASA Tech Rep     Last Followup: │00/00/00│   │
 │          │00/00/00│ From NASA Tech Rep                        │
 │ │00/00/00│ ☐ To Company           Last Followup: │00/00/00│   │
 │          │00/00/00│ From Company                              │
 │ │00/00/00│ ⊠ Request for Specific Items  Last Followup:│00/00/00││
 │          │00/00/00│ From Company                              │
 │ Potential Reportable Items   ( Add... )   ( Edit... )         │
 │  ┌──────────────┬──────────────────────────────────┐ ▲       │
 │  │ Case Number  │ Title                              │ │      │
 │  │              │                                    │ │      │
 │  │              │                                    │ ▼      │
 │  └──────────────┴──────────────────────────────────┘         │
 │                             Number of Reportable Items : 0    │
 │         Boxes checked indicate letter will be generated automatically. │
 └─────────────────────────────────────────────────────────────┘
```

Contract   Grant   Data   Screen   (5)   –   Letters   Cont'd

```
═══════════════ Contract_Grant: Adding New Record ═══════════════ 

Activity No. │NAS10-Sample│                                    ( i )
 ┌─────────────────────────────────────────────────────────────┐
 │                        Letters (Cont'd)                       │
 ├─Request for Final NT Report───────────────────────────────── ┤
 │ │00/00/0000│ ⊠ To Company          Last Followup: │00/00/00│  │
 │          │00/00/00│ Final NTR Report Date                     │
 │          │00/00/00│ Final NTR Approval Date                   │
 │          │00/00/00│ ☐ Certification of Compliance Letter      │
 │ │00/00/00│ ⊠ To NASA Tech Rep      Last Followup: │00/00/00│  │
 │          │00/00/00│ Final NTR Report Date                     │
 │          │00/00/00│ ⊠ Certification of Compliance Letter      │
 │         Boxes checked indicate letter will be generated automatically. │
 ├─Clauses Included in Contract or Grant─────────────────────── ┤
 │ │00/00/00│ ☐ New Technology Clause (Large Business)           │
 │ │00/00/00│ ☐ Patent Rights Retention by Contractor            │
 │ │00/00/00│ ☐ Patent Rights Retention by Grantee               │
 │ │00/00/00│ ☐ Patent Rights for Small Business                 │
 │ │00/00/00│ ☐ SBIR Rights in Data                              │
 └─────────────────────────────────────────────────────────────┘
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Contract Grant Data Screen (6) New Technology

Contract Grant Data Screen (7) Chonrology

More Financial

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┌─────────────────────────────────────────────────────────────────────┐
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│ ┌──────────┐ ┌────────────────────────────────────────────────────┐ │
│ │          │ │ Activity No. [Test           ]                 ⓘ   │ │
│ │  ┌────┐  │ │ ┌────────────────────────────────────────────────┐ │ │
│ │  │ ✓  │  │ │ │              More Financial                    │ │ │
│ │  └────┘  │ │ └────────────────────────────────────────────────┘ │ │
│ │  Accept  │ │                                                    │ │
│ │          │ │  Contract Value [0                 ]               │ │
│ │          │ │     Prior FY Obs [             $0]                 │ │
│ │          │ │   Current FY Obs [             $0]                 │ │
│ │          │ │          Type  [                        ]          │ │
│ │          │ │                                                    │ │
│ │          │ │                                                    │ │
│ │          │ │                                                    │ │
│ │  ┌────┐  │ │                                                    │ │
│ │  │NASA│  │ │                                                    │ │
│ │  └────┘  │ │                                                    │ │
│ │ TechTracS│ │                                                    │ │
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Closeout Problem

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┌─────────────────────────────────────────────────────────────────────┐
│░░░░░░░░░░░░░░░░░ Contract_Grant: Adding New Record ░░░░░░░░░░░░░░░░░ ▤ │
│ ┌──────────┐ ┌────────────────────────────────────────────────────┐ │
│ │          │ │ Activity No. [Test           ]                 ⓘ   │ │
│ │  ┌────┐  │ │ ┌────────────────────────────────────────────────┐ │ │
│ │  │ ✓  │  │ │ │                 Closeout                       │ │ │
│ │  └────┘  │ │ └────────────────────────────────────────────────┘ │ │
│ │  Accept  │ │                                                    │ │
│ │          │ │  Partial Closeout [00/00/0000]   ● Active          │ │
│ │          │ │   Closeout Recvd [00/00/00]      ○ Inactive        │ │
│ │          │ │    Closeout Date [00/00/00]    Inactive Date [00/00/00] │
│ │          │ │        Problem [                        ]          │ │
│ │          │ │                                                    │ │
│ │          │ │                                                    │ │
│ │  ┌────┐  │ │                                                    │ │
│ │  │NASA│  │ │                                                    │ │
│ │  └────┘  │ │                                                    │ │
│ │ TechTracS│ │                                                    │ │
│ └──────────┘ └────────────────────────────────────────────────────┘ │
└─────────────────────────────────────────────────────────────────────┘
```

More SBIR/STTR

Contract_Grant: Adding New Record

Activity No. Test

SBIR Phase I

Year

0 Phase

Proposal Number

Control Number

$0 Proposed Cost

Funding Document

00/00/00 Final Report

SBIR Reports [Add...]

Report Date

Number of SBIR Reports : 0

SBIR Funding [Add...]

Amount	Report Date

Number of Funding Docs : 0

Total Contract Amount $0

Remaining Amount $0

Accept

TechTracS

Partnerships

Contract_Grant: Adding New Record

Activity No. Test

Partnerships

[Edit...]

Commercialization Practice	UPN	Agreement	Actual End	Status

Number of Partnerships : 0

Partnerships are added from Inventory Records. You can do this from the UPN Inentory page which is accessed from the General Information page of Contract_Grant which is where you will be when you click on the accept button on this page.

Accept

TechTracS

Inventory

Contract_Grant: Adding New Record

Activity No. Test

UPN Inventory

Accept

Add...   Edit...

UPN	FPN	Prior Inv.	Current Inv.	Comrcl. Pot.

Totals $0 $0   (Based on FACF)

Contract Value $0   (Based on FACP)
Prior FY Obs $0   (Based on FACP)
Current FY Obs $0   (Based on FACP)
Not Obligated $0   (Based on FACP)

NASA TechTracS

Potential Reportable Items

Contract_Grant: Adding New Record

Contract #   Test

Potential Reportable Item

Accept

Cancel

Title

Identified by TRCO   00/00/00

Resultant Case Number   ☐ Not Reported

To Company Date   00/00/00   Followup Date   00/00/00

Received in TUO   00/00/00

Company Response Date   00/00/00

NASA TechTracS

Constants Data Screen 2

Constants: 1 of 1 records in selection

Accept   Cancel   Record   More   Print   Help

Contract/Grant Site Document Policies I

Initial Letter
- ☒ To Company (Series 100,101,102)
- ☐ To NASA Tech Rep (Series 110,111,112)

Request at End of Contract
- ☐ To Contractor   `30` days before Completion Date (Series 130,131,132)
- ☐ To NASA Tech Rep   `30` days before Completion Date (Series 140,141,142)
- ☒ Request for Specific Items

Request for Final Report
- ☐ To Company (In Closeout) (Series 160,161,162)
  - or   ☐ Certification of Compliance (165,166,167)
- ☒ To Contractor/   `30` days before Contract/Grant Complete date.
- ☐ To NASA Tech Rep (In Closeout) (Series 170,171,172)
  - or   ☒ Certification of Compliance (175,176,177)
- ☒ To NASA Tech Rep   `30` days before Contract/Grant Complete date.

Boxes checked indicate letter will be generated automatically.

NASA TechTracS

Constants Data Screen 3

Constants: 1 of 1 records in selection

Accept   Cancel   Record   More   Print   Help

Contract/Grant Site Document Policies II

Followup Letter
- ☒ Send followup letter   `30` days after initial letter.
- ☒ Flag for followup   `45` days after initial letter to   **Joyce Eller-Haskel**

Boxes checked indicate letter will be generated automatically.

Form 666 Approval Name | David R. Makufka

☒ Automatically Generate 433 Ticket

☒ Automatically Generate Tech Innovator Check Receipts

`5` Number of SBIR Purchase Request (KSC)

`1998` Partnership Year

NASA TechTracS

New User interface screens

Contract   Grant   List   Screen

Contract No.	Contract/Grant Title	Award Date Completion Dt
NAS10-Sample	Sample Contract	00/00/00
Center KSC		00/00/00
Center		
Center		
Center		
Center		
Center		
Center		
Center		

Contract_Grant: 1143 records in selection

Add   Query   Order by   Print   Report   Sets   Help   Relate   Tables   Return

Contract Grant Data Screen (1) General Information

```
┌─────────────────────────────────────────────────────────────────────┐
│          Contract_Grant: 1143 of 1143 records in selection            │
├───────┬───────────────────────────────────────────────────────────────┤
│ ✓     │ Contract/Grant No.  NAS10-Sample    Center KSC          [ i ] │
│Accept │ ─────────────────── General Information ───────────────────── │
│ ✗     │ Contract/Grant Title    Contract/Grant Organization Code [   ]│
│Cancel │ Sample Contract                                          ▲     │
│ ◀▶    │                                                          ▼     │
│Record │ ┌─Information────────────────────────────────────────────────┐ │
│ 🖱     │ │ [Status] Contract/Grant Record Created/Activated 11/05/1998│ │
│ More  │ │ Date Awarded 00/00/00        ☐ Reporting Obligations       │ │
│ 🖨     │ │  Date Ending 00/00/00        ☐ Commercial Potential        │ │
│ Print │ │ Total Amount $0              ☐ Partnership(s)              │ │
│ ?     │ │                              ☐ Public Data Release to NTAS │ │
│ Help  │ │ Date CTO Closed 00/00/00          Kind of Contract/Grant   │ │
│       │ │        ○ Active  ○ Inactive    [                        ]  │ │
│       │ │ Closeout Problem [                  ]                       │ │
│       │ └────────────────────────────────────────────────────────────┘ │
│ NASA  │ ┌─Organization───────────────────────────────────────────────┐ │
│       │ │  Name [                              ] 🖉  [ Address ]      │ │
│TechTracS│ │ Type [                    ]  Ownership [              ]    │ │
│       │ │      Subcontracts [0]  [ Add... ]  [ New Window... ]       │ │
│       │ └────────────────────────────────────────────────────────────┘ │
└───────┴───────────────────────────────────────────────────────────────┘
```

Contract Grant Data Screen (2) General Information (Cont'd)

```
┌─────────────────────────────────────────────────────────────────────┐
│          Contract_Grant: 1143 of 1143 records in selection            │
├───────┬───────────────────────────────────────────────────────────────┤
│ ✓     │ Contract/Grant No.  NAS10-Sample                        [ i ] │
│Accept │ ──────────────── General Information (Cont'd) ─────────────── │
│ ✗     │ Contract/Grant Abstract  📄                                   │
│Cancel │ ┌────────────────────────────────────────────────────────┐ ▲ │
│ ◀▶    │ │                                                        │   │
│Record │ │                                                        │ ▼ │
│ 🖱     │ └────────────────────────────────────────────────────────┘   │
│ More  │ ┌─Other Information────────────────────────────────────────┐  │
│ 🖨     │ │     Type [                    ]  Prior FY Obs      $0    │  │
│ Print │ │                                 Current FY Obs     $0    │  │
│ ?     │ │ Serv./Prod. [    ] [                                  ]  │  │
│ Help  │ │   SIC Code [    ] [                                   ]  │  │
│       │ └──────────────────────────────────────────────────────────┘  │
│       │ ┌─Clauses included in Contract/Grant──────────────────────┐    │
│       │ │ ☐ New Technology Clause (Large Business)                │    │
│       │ │   (Large Business Contractor or Cooperative             │    │
│ NASA  │ │   Agreement Recipient)          ┌─Keywords──── [+][–]┐  │    │
│       │ │ ☐ Patent Rights Retention by Grantee │ CONTRACT    ▲ │  │    │
│TechTracS│ │   (Small Business, College/Univ./NPO)│ SAMPLE       │ │    │
│       │ │ ☐ Patent Rights Retention by Contractor│            ▼ │  │    │
│       │ │   (Small Business, College/Univ./NPO)└──────────────┘  │    │
│       │ └──────────────────────────────────────────────────────────┘  │
└───────┴───────────────────────────────────────────────────────────────┘
```

Contract Grant Data Screen (3) Contacts

Contract Grant Data Screen (4) Letters

Contract   Grant   Data   Screen   (5)   Interim/New   Tech   Info

Contract   Grant   Data   Screen   (6)   SBIR/STTR   Information

Contract   Grant   Data   Screen   (7)   Chronology/Action   Items

Contract   Grant   Data   Screen   (8)   Inventory/Partnerships/SStories

Constants Data Screen (Data Screen 2)

```
Constants: 1 of 1 records in selection
```

Contract/Grant Site Document Policies

Accept
Cancel
Record
More
Print
Help

┌─**Initial Letter**───
│ ☒ To Company (Series 100,101,102)
│ ☐ To Contracting Ofcr. Tech Rep. (Series 110,111,112)
└───

┌─**Interim Letter**──
│ ☒ To Company (Series TBD)   [30] days before Contract Anniversary.
└───

┌─**Request for Final NT Report**───────────────────────────────
│ ☐ To Company (In Closeout) (Series 160,161,162)
│   or   ☐ Certification of Compliance (165,166,167)
│ ☒ To Company   [30] days before Contract/Grant Complete date.
│ ☐ To COTR (In Closeout) (Series 170,171,172)
│   or   ☒ Certification of Compliance (175,176,177)
│ ☒ To COTR   [30] days before Contract/Grant Complete date.
└───

┌─**Followup Letter**──
│ ☒ Send followup letter   [30] days after initial letter.
│ ☒ Flag for followup   [45] days after initial letter to [▽]
└───

Boxes checked indicate letter will be generated automatically.

NASA
TechTracS

Constants Data Screen (Data Screen 3)

```
Constants: 1 of 1 records in selection
```

Misc. Settings

Accept
Cancel
Record
More
Print
Help

Form 666 Approval Name [   ]

☒ Automatically Generate 433 Ticket

☒ Automatically Generate Tech Innovator Check Receipts

[5] Number of SBIR Purchase Request (KSC)

[1998] Partnership Year

NASA
TechTracS

New /Modified Reports

CG Summary (TBD)

CG Tickler (TBD)

Chronology Summary (TBD)

Contract Statistics (TBD)

Contractor and Contracts (TBD)

Contracts for Certification (TBD)

NTRs By Contract Number (TBD)

Potential Reportable Items (Deleted)

Purchase Request (currently hard coded for KSC)

SBIR Contracts (TBD)

SBIR History (TBD)

SBIR Monthly (TBD)

Data Interfaces

Current (FY98.03.xx)   Tables/Fields

Item	Field	Type
[Contract_Grant]		
Acceptable NTR	59	Date
Award Dt	8	Date
Buyer Code	86	Longint
CG Status	16	Text
CG Status Date	18	Date
Closeout Date	51	Date
Closeout Recvd	89	Date
Co Certify Dt	56	Date
Co Certify Ltr	40	Boolean
Co Contract Rep	4	Longint
Co New Tech Rep	3	Longint
Co Tech Rep PI	7	Longint
Company Code	2	Longint
Completion Dt	9	Date
Comrcl Potentia	108	Boolean
Contract	11	Boolean
Contract Amount	10	Real
Contract Number	1	Alpha 25
Contract Type	104	Alpha 30
Current Amt	107	Real
Date Entered	87	Date
Description	100	Text
FACP CN	114	Alpha 11
FACP Kind	115	Alpha 2
Field Center	101	Alpha 4
Final Co Flw 1	79	Boolean
Final Co Flw 2	80	Boolean
Final Co Rcv Dt	58	Date
Final NTR Co	38	Boolean
Final NTR Co Dt	57	Date
Final NTR NASA	62	Boolean
FinNTR NASA Dt	63	Date
Fixed Price	21	Boolean
FM NASA Office	113	Alpha 20
FM NASA Org	112	Alpha 35
FM NASA Phone	111	Alpha 15
FM NASA POC	110	Alpha 45
FM Pro Ref	109	Alpha 25
Fnl Co Flw Dt	69	Date
Fnl NASA Flw 1	77	Boolean
Fnl NASA Flw 2	78	Boolean
Fnl NASA Flw Dt	68	Date
Fnl NASA Rcv Dt	41	Date
Funding Documen	97	Alpha 8
Grant	12	Boolean
How Closed	90	Alpha 2
ID	116	Longint
Inactive	46	Boolean
Inactive Date	85	Date

Item	Field	Type
Init Ltr NASA	52	Boolean
Init Ltr to Co	33	Boolean
Init to Co Dt	54	Date
Init to NASA Dt	53	Date
Interim Flw Dt	81	Date
Interim Ltr	34	Boolean
Interim Ltr Dt	44	Date
Interim Rsp Dt	82	Date
Kind of Activty	98	Alpha 35
Last Update	42	Date
NASA Certify Dt	35	Date
NASA Certify Lt	37	Boolean
NASA Cont Ofcr	5	Longint
NASA HQ POC	102	Longint
NASA Tech POC	6	Longint
Non Profit	26	Boolean
NT Clause	29	Boolean
NT Clause Dt	70	Date
NT Co Flwup Dt	65	Date
NT Flwup Co 1	49	Boolean
NT Flwup Co 2	50	Boolean
NT Flwup NASA 1	47	Boolean
NT Flwup NASA 2	48	Boolean
NT from Co Dt	24	Date
NT from NASA Dt	19	Date
NT NASA Flw Dt	66	Date
NT Req Co	25	Boolean
NT Req Co Dt	22	Date
NT Req NASA	20	Boolean
NT Req NASA Dt	17	Date
Partial Closeou	88	Date
Partnership	103	Boolean
PR Ret Contr Dt	72	Date
PR Ret Contract	27	Boolean
PR Ret Grant Dt	71	Date
PR Ret Grantee	31	Boolean
PRI Clause	83	Boolean
PRI Clause Dt	84	Date
Prior Amt	106	Real
PRSB Clause	30	Boolean
PRSB Clause Dt	73	Date
Public Access	117	Boolean
Report Obl	118	Boolean
SBIR	13	Boolean
SBIR Clause	32	Boolean
SBIR Clause Dt	74	Date
SBIR Contrl No	92	Alpha 6
SBIR Fnl Rep Dt	96	Date
SBIR Phase	61	Integer
SBIR Prop Cost	93	Real
SBIR Propsl No	91	Alpha 6
SBIR Subtopic	95	Alpha 2
SBIR Topic	94	Alpha 2
SBIR Year	60	Alpha 4
Service_Product	99	Alpha 4
SIC	105	Alpha 6

Item	Field	Type
Small Business	15	Boolean
Sp Item Flw 1	75	Boolean
Sp Item Flw 2	76	Boolean
Sp Item Flw Dt	67	Date
Sp Item Rcvd Dt	64	Date
Spec Items Dt	55	Date
Spec Items Ltr	36	Boolean
Title	43	Text
TRCO Ltr Dt	45	Date
TT Comp Dt	28	Date
University	14	Boolean
Withhold Ltr	39	Boolean
Withholdfrom AW	119	Boolean
X1 Not Used	23	Subtable

Item	Field	Type
[Contract Reports]		
Contract Number	1	Alpha 25
ID	4	Longint
Report Date	2	Date
Report Text	6	Text
Report Year	3	Date
Type	5	Alpha 20

Item	Field	Type
[SBIR Funding]		
Amount	3	Real
Contract Number	1	Alpha 25
Funding Date	4	Date
Funding Document	6	Alpha 12

Item	Field	Type
[SBIR Status Report]		
Contract Number	1	Alpha 25
Report Date	4	Date

Item	Field	Type
[Subcontracts]		
Award Date	3	Date
Company Code	2	Longint
Contract Number	1	Alpha 25
Date Awarded	4	Text
Estimated Completion Date	5	Date
New Technology Clause	6	Boolean
Number	8	Alpha 20
Patent Rights Clause	7	Boolean
Work to be performed	9	Text

Item	Field	Type
[Pot_Rep Items] ***Entire Table no longer used***		

Item	Field	Type
Case Number	2	Alpha 16
Co Response Dt	6	Date
Code	9	Integer
Contract Number	1	Alpha 25
Followup Date	12	Date
ID	15	Longint
Not Reported	4	Boolean
Recvd in TUO	13	Date
Response Date	5	Date
Sp Item Flw 1	10	Boolean
Sp Item Flw 2	11	Boolean
Title	3	Text
To Co Ltr Type	14	Alpha 5
To Compy Date	8	Date
TUNS 400 Dt	7	Date

Revised Tables/Fields

Item	Changes
[Contract_Grant]	
Acceptable NTR	Remove. Make chronology record.
Award Dt	Change name to **Date Awarded**
Buyer Code	Change name to **Other Contact People Code**. Retain data.
CG Status	Change name to **Status**
CG Status Date	Change name to **Data of Status**
Closeout Date	Change name to **Date CTO Closed**
Closeout Recvd	Remove. Make chronology record
Co Certify Dt	Remove. Make chronology record
Co Certify Ltr	Remove. Make chronology record
Co Contract Rep	NEW NAME - **C/G Contract Rep People Code** Change name to C/G Contract Rep ID (∅ Should we change [People Code]People Code to [People]ID? The people reference is referred as People Code elsewhere in NASA TechTracS)
Co New Tech Rep	Change name to **C/G New Tech Rep People Code**
Co Tech Rep PI	Change name to **C/G Principal Investigator Code**
Company Code	Leave as **Company Code** ~~Organization ID (∅ Do we change Company table to Organiztion? The company is referred as Company Code elsewhere in NASA TechTracS)~~
Completion Dt	Change name to **Date Ending**
Comrcl Potentia	Change name to **Commercial Potential**
Contract	Invisible field-used to indicate the record is a Contract (needs updating)
Contract Amount	Change name to **Total Amount**
Contract Number	Change to **Contract/Grant No.**
Contract Type	Display on 2nd page of General Information (ie Fixed Price)
Current Amt	Change name to **Current Amount** (Display on 2nd page of General Information)
Date Entered	∅ Not displayed on the screen. Date the record

Item	Changes
	was created. Make invisible and migrate to Audit table.
Description	Change name to **Contract Grant Abstract**
FACP CN	Used to indicate Contract was loaded from FACS and is the Contract number as used by FACS.
FACP Kind	Only referenced by method FACP Data. Field should be renamed as **Spare** and reused.
Field Center	Change name to **Center (∅ Should we use this same name in other tables? [YES])**
Final Co Flw 1	Make invisible.
Final Co Flw 2	Make invisible.
Final Co Rcv Dt	Change name to **Date Final NTR Received.**
Final NTR Co	Change name to **Requested Final NTR**
Final NTR Co Dt	Change name to **Date Request Final NTR**
Final NTR NASA	Change name to **Req Signoff from NASA COTR**
FinNTR NASA Dt	Change name to **Date Req Signoff from NASA COTR**
Fixed Price	Not referenced. Field should be renamed as **Spare** and reused. **Make chronology record?**
FM NASA Office	Field should be renamed as **Spare** and reused. Make chronology record.
FM NASA Org	Field should be renamed as **Spare** and reused. Make chronology record.
FM NASA Phone	Field should be renamed as **Spare** and reused. Make chronology record.
FM NASA POC	Field should be renamed as **Spare** and reused. Make chronology record.
FM Pro Ref	Field should be renamed as **Spare** and reused. Make chronology record.
Fnl Co Flw Dt	Change name to **Date Req Final NTR Flwp**
Fnl NASA Flw 1	Make invisible.
Fnl NASA Flw 2	Make invisible.
Fnl NASA Flw Dt	Change name to **Date Req Signoff From COTR Flwp**
Fnl NASA Rcv Dt	Change name to **Date Rec Final Signoff From COTR**
Funding Documen	Change name to **SBIR/STTR Purchase Request Number**
Grant	
How Closed	Change name to **Closeout Problem**
ID	
Inactive	Change name to **Active** (Do we need to reverse the current value?) [YES].
Inactive Date	Field should be renamed as **Spare** and reused.
Init Ltr NASA	Change name to **Initial Letter to NASA COTR**
Init Ltr to Co	Change name to **Initial Letter to Company** (∅Change name to Organization?) [Leave as is].
Init to Co Dt	Change name to **Date Initial Letter to Company**
Init to NASA Dt	Change name to **Date Initial Letter to NASA COTR**
Interim Flw Dt	Change name to **Date Req Interim Report Flwp**
Interim Ltr	Change name to **Request Interim Report**
Interim Ltr Dt	Change name to **Date Requested Interim Report**
Interim Rsp Dt	Field should be renamed as **Spare** and reused.
Kind of Activty	Change name to **Kind of Contract or Grant**
Last Update	No change.
NASA Certify Dt	Change name to **Date Issued Cert Compliance Ltr**
NASA Certify Lt	Change name to **Issue Cert Compliance Letter**
NASA Cont Ofcr	Change name to **NASA Contract Specialist Code (∅ People Code instead of ID No.?) [Use Code]**
NASA HQ POC	Change name to **NASA Comcrl Tech Ofc Rep Code (∅**

Item	Changes
	People Code instead of ID No.?)(Make Chronology of existing data? NO) [Use Code]
NASA Tech POC	Change name to **NASA COTR People Code (∅ People Code instead of ID No.?) [Use People Code]**
Non Profit	Field should be renamed as **Spare** and reused. CG summary report needs updating. (Company Business type can used to deterime this)
NT Clause	New Technology Clause
NT Clause Dt	Field should be renamed as **Spare** and reused.Make chronology record.
NT Co Flwup Dt	Field should be renamed as **Spare** and reused.
NT Flwup Co 1	Field should be renamed as **Spare** and reused.
NT Flwup Co 2	Field should be renamed as **Spare** and reused.
NT Flwup NASA 1	Field should be renamed as **Spare** and reused.
NT Flwup NASA 2	Field should be renamed as **Spare** and reused.
NT from Co Dt	Field should be renamed as **Spare** and reused.
NT from NASA Dt	Field should be renamed as **Spare** and reused.
NT NASA Flw Dt	Field should be renamed as **Spare** and reused.
NT Req Co	Field should be renamed as **Spare** and reused.
NT Req Co Dt	Field should be renamed as **Spare** and reused.
NT Req NASA	Field should be renamed as **Spare** and reused.
NT Req NASA Dt	Field should be renamed as **Spare** and reused.
Partial Closeou	Field should be renamed as **Spare** and reused. (∅ **Make chronology record?)**
Partnership	
PR Ret Contr Dt	Field should be renamed as **Spare** and reused.Make chronology record.
PR Ret Contract	Rename **PR Retention by Contractor** ~~Field should be renamed as~~ **Spare** ~~and reused.~~ (∅ ~~Use to set PRSB Clause?)~~
PR Ret Grant Dt	Field should be renamed as **Spare** and reused.Make chronology record.
PR Ret Grantee	Change name to **PR Retention by Grantee**
PRI Clause	Field should be renamed as **Spare** and reused.Make chronology record?
PRI Clause Dt	Field should be renamed as **Spare** and reused.Make chronology record.
Prior Amt	106
PRSB Clause	Field should be renamed as **Spare** and reused. ~~Change name to~~ **PR Contractor.** ~~(∅ Should the current field PR Ret Contract set this field?)~~
PRSB Clause Dt	Field should be renamed as **Spare** and reused.Make chronology record.
Public Access	Change name to **Public Data Release to NTAS**
Report Obl	Change name to **Reporting Obligations.**
SBIR	Field should be renamed as **Spare** and reused. (Kind of Activity can used to deterime this)
SBIR Clause	Field should be renamed as **Spare** and reused.Make chronology record.
SBIR Clause Dt	Field should be renamed as **Spare** and reused.Make chronology record.
SBIR Contrl No	Change name to SBIR/STTR Control Number
SBIR Fnl Rep Dt	Change name to **Date Recvd Final TReport from Co**
SBIR Phase	Change name to **SBIR/STTR Phase**

Item	Changes
SBIR Prop Cost	Change name to **SBIR/STTR Proposed Cost**
SBIR Propsl No	Change name to **SBIR/STTR Proposal Number**
SBIR Subtopic	Change name to **SBIR/STTR Subtopic**
SBIR Topic	Change name to **SBIR/STTR Topic**
SBIR Year	Change name to **SBIR/STTR Program Year**
Service_Product	Change name to **Service_Product Code**
SIC	Change name to **SIC Code**
Small Business	Field should be renamed as **Spare** and reused. (Company Business type can be used to deterime this)
Sp Item Flw 1	Make invisible.
Sp Item Flw 2	Make invisible.
Sp Item Flw Dt	Change name to **Date Received Specific Item Flwp**
Sp Item Rcvd Dt	Change name to **Date Received Specific Item**
Spec Items Dt	Change name to **Date Requested Specific Item**
Spec Items Ltr	Field should be renamed as **Spare** and reused. ~~Change name to **Requested Specific Item**~~
Title	Change name to **Contract_Grant Title**
TRCO Ltr Dt	Field should be renamed as **Spare** and reused.
TT Comp Dt	Field should be renamed as **Spare** and reused. (Used in method Form 1484)
University	Field should be renamed as **Spare** and reused. (Used in method SetClauses and CG Summary Ino)(Company Business type can used to deterime this)
Withhold Ltr	Field should be renamed as **Spare** and reused.
Withholdfrom AW	Set during FACS update to indicate that Contract has moved to another center and should no longer be WANed to Agencywide.
X1 Not Used	23
Remaining Amount	**NEW Field; Real**
Contract Grant Org Code	**NEW FIELD** Alpha 10; Initially populated by COTR Org Code

Item	Field
[SBIR/STTR Purchase Request]	Changed from **[SBIR Funding]**
Amount	
Contract Number	
Funding Date	
Funding Document	

Item	Field
[SBIR/STTR Technical Report]	Changed from **[SBIR Status Report]**
Contract Number	
Report Date	

Item	Field
[Contract Reports]	⊘ **Should the Table Name change to Interim NT Reports?**
Contract Number	
ID	
Report Date	

Item	Field
Report Text	
Report Year	
Type	
Number of NTRs	**NEW FIELD.** Longint; Might be added to NASA eNTRe.
Due Date	**NEW FIELD.** Date; Is this calculated automatically? If so when.

Questions?

Things to check for : Entry Order, Date Format(mm/dd/yyyy forced)/Filter (!0&9##/##/####), Font Attributes (Style Sheet)

Appendix A - Checklists

FORM COMPONENT REVIEW CHECKLIST

STRUCTURE COMPONENT REVIEW CHECKLIST

Form Component Review Checklist

Component Name		Release	
Mod/ Task Number		Review Date	
Developer		Reviewer	

KEY REVIEW QUESTIONS	Yes	No	Corrected
1. Do any form elements fail to follow proper style guidelines for all platforms?			
2. Is any data type incorrect or inconsistent?			
3. Is any coded algorithm inconsistent with an algorithm explicitly stipulated in PDL or in requirements/specifications?			
4. Does the component fail SanityCheck tests?			
5. Is any external interface incorrectly coded? That is, is any call statement or file/database access incorrectly coded?			
6. Is any logic path incorrect?			
7. Does the component have multiple entry points or multiple, normal (non-error) exits?			
ADDITIONAL REVIEW QUESTIONS			
8. Is any part of the component inconsistent with the unit design specified in the prolog and PDL?			
9. Does the code or test plan contain any unauthorized deviations from project standards?			
10. Does the component contain any error messages that might be unclear to the user?			
11. If the component was designed to be reusable, has any hindrance to reuse been introduced in the code?			

ACTION ITEMS AND COMMENTS
Continue on a separate sheet. Refer to questions above by number.

REVIEW RESULTS	
1. If all answers to all questions were "No, " the component passes. **Check here and sign below . . .**	
2. If there are serious deficiencies in the component (e.g., if more than one key question was answered "Yes") the developer must correct the component design and the reviewer must schedule another review. **Scheduled date for review . . .**	
3. If there are minor deficiencies in the component, the developer must correct the component design and hold a follow-up meeting with the reviewer. **Scheduled date for follow-up meeting . . .**	

Reviewer's signature certifies that this component meets all applicable standards and satisfies its requirements, and that any identified deficiencies have been resolved (applicable at initial review, follow-up meeting, or re-review).

Reviewer Signature: _____ Date: _____

Structure   Component   Review   Checklist

Component Name		Release	
Mod/ Task Number		Review Date	
Developer		Reviewer	

KEY REVIEW QUESTIONS	Yes	No	Corrected
1. Are any table fields improperly typed or missing or improperly named?			
2. Are any fields improperly indexed?			
3. Are any fields improperly flagged as invisible?			
4. Are Table Privileges or Triggers improperly set?			
5. Is there more than one relation between any two tables?			
6. For each relation, are Many-to-One or One-to-Many Relation Options improperly set?			
7. For each relation, are Wildcard Choice or Deletion Control options improperly set?			
8. For each Trigger, are any Database events omitted?			
9. For each Trigger, does the method fail to return the proper value?			
ADDITIONAL REVIEW QUESTIONS			
10. For each table, is the Table Number/ID Field Number missing from WANTables list?			
11. Does the user structure diagram not reflect the actual structure?			

ACTION ITEMS AND COMMENTS
Continue on a separate sheet. Refer to questions above by number.

REVIEW RESULTS	
1. If all answers to all questions were "No, " the component passes. **Check here and sign below . . .**	
2. If there are serious deficiencies in the component (e.g., if more than one key question was answered "Yes") the developer must correct the component design and the reviewer must schedule another review. **Scheduled date for review . . .**	
3. If there are minor deficiencies in the component, the developer must correct the component design and hold a follow-up meeting with the reviewer. **Scheduled date for follow-up meeting . . .**	

Reviewer's signature certifies that this component meets all applicable standards and satisfies its requirements, and that any identified deficiencies have been resolved (applicable at initial review, follow-up meeting, or re-review).

Reviewer Signature: _____ Date: _____

Appendix B – Programming Standards

Naming Conventions

The module prefix for this modification is CG. All objects created in the execution of this modification will utilized this prefix as indicated in the *4th Dimension Coding and Structure Rules* document maintained by the developer.

The developer should refer to the online resources available at:

http://intranet.knowledgesharing.com/InHouseDocs/Code and Structure Rules.pdf

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